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SPECIAL QUESTION LIST  
for  
PAYROLL CLERK POSITIONS

The following list of suggested items is offered as an aid to position classifiers in auditing and evaluating payroll clerk positions. Few positions will require answers to all the questions. All are included in this list to make sure that every important part of a Payroll Clerk position is credited in determining the classification and grade level of the position. If any question does not apply, it should be ignored.

Indicate:

1. Extent of responsibility for work involving other than strictly payroll duties, such as maintenance of time and leave, and retirement records, or maintenance of accounts for war bond allotments.
2. Scope and variety of duties; specifically whether they include actual responsibility for the independent preparation of payrolls, the maintenance of payroll records, the preparation of schedules to accompany payrolls, and the making of necessary computations, all requiring the application of pertinent federal laws, rules, regulations and decisions.
3. Extent to which official authorization documents relating to all types of personnel actions are reviewed, and for what purpose.
4. Responsibility for maintenance of payroll accounts according to the Individual Earnings Record system, the accounts including such items as basic pay, adjustments in pay, overtime pay, Victory and income tax deductions, war bond allotments, retirement deductions, and net pay.
5. Participation in, and responsibility for, the preparation of reports and correspondence covering all phases of the work.
6. Knowledge required of a variety of government forms, as to the purpose of the forms, the information to be furnished on them, the number of copies to be prepared, and the persons or offices to which they are to be sent periodically.
7. Variety of types of employees of the Agency, as, permanent, temporary, war service, per annum, per diem, when actually employed, part time, etc.
8. Whether incumbent serves as the bonded certifying officer for the department or independent establishment with respect to payrolls.
9. Nature and purpose of contacts with others, as in giving out information or in the assembling and processing of payroll data. Describe any field trips made, their purpose, and the time devoted to them.

AFN 201804

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10. Extent of authority to make final decisions, to make recommendations which result in administrative action, or to represent the office in conferences and meetings.
11. Responsibility for developing and establishing, or for adapting, payroll procedures, forms, and systems.
12. Degree of independence of operation, with respect to instructions received and review of work. Indicate the kinds of questions on which superiors are consulted.
13. Responsibility for supervising the work of others. Indicate the title and classification grade of each position, and the name of the incumbent.

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Washington, D. C.SPECIAL QUESTION LIST  
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PROPERTY & SUPPLY CLERK POSITIONS

The following list of suggested items is offered as an aid to position classifiers in auditing and evaluating Property and Supply Clerk positions. Few positions will require answers to all of the questions. All are included in this list to make sure that every important part of a Property and Supply Clerk position is credited in determining the classification and grade level of the position. If any question does not apply, it should be ignored.

## Indicates:

1. Variety of classes of materials, supplies, and equipment (as defined in the Federal Stock Catalog) that are received, distributed, and controlled. Give an estimate of the total dollar value involved, and an indication of stock turnover rate.
2. Number of offices and locations to which material is furnished and the variety of demands for service.
3. Different kinds of duties performed in the office, such as posting to property records, filing, receiving and reviewing requisitions, taking inventories, negotiating, conducting correspondence, expediting, supervising, or making property surveys. If more than one kind of work is done, indicate the amount of time devoted to each. Point out any problems or difficulties involved, and what knowledges, skills and experience are required to resolve the difficulties.
4. With whom, and for what purpose, personal contacts are made. Give particular attention to the conducting of property surveys in the field, serving as a member of a review board, giving out information, advising and assisting in the installation of property control systems, and negotiating for the transfer or disposition of surplus equipment.
5. Participation in the preparation of correspondence and reports, and the purposes of such documents.
6. Authority to make recommendations or final decisions with respect to:
  - acceptability of requisitions
  - availability of supplies
  - feasibility of repairs to equipment
  - availability and use of substitute materials
  - disposal or transfer of property
  - procedures to be followed in the work
  - record system to be used
  - production schedules to be met on assigned work

7. Exercise of originality or ingenuity, as in developing uniform property accountability systems for activities; devising policies and procedures for the operation of a system; preparing correspondence, circular letters and instruction manuals; or, in applying and interpreting regulations, decisions, and procedures governing the procurement and supply work of the organization.
8. From whom supervision is received, and the nature of that supervision. Indicate how assignments are received, the kind of instructions given with assignments, and the nature of checks on work in progress. Point out what review is made of completed work, and what types of questions are referred to the supervisor for decision or discussion.
9. Employees supervised. Indicate the title and classification grade of each position, and the name of the incumbent. Describe the manner in which supervision is exercised, and what problems of planning, coordination and control exist.

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SPECIAL QUESTION LIST  
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FISCAL ACCOUNTING & AUDITING CLERK POSITIONS

The following list of suggested items is offered as an aid to position classifiers in auditing and evaluating Fiscal Accounting and Auditing Clerk positions. Few positions will require answers to all of the questions. All are included in this list to make sure that every important part of a Fiscal Accounting and Auditing Clerk position is credited in determining the classification and grade level of the position. If any question does not apply, it should be ignored.

Indicate:

1. The percentage of total working time spent on clerical-accounting work. Indicate, for example:
  - Responsibility for keeping a financial record, ledger, or book of account. Describe the record, e.g., general ledger, allotment ledger, cash control book, etc., and the types of documents from which postings are made. Indicate the number of accounts to which postings are made, and the number of appropriations involved.
  - The variety of accounting tasks performed, such as posting, reconciling and adjusting, taking trial balances, preparing regular and special reports and statements, coding, and scheduling. Indicate the approximate amount of time devoted to each phase.
  - All accounting forms worked with. Show the use that is made of them; why they are referred to.
  - All machines used in the work. Indicate the percentage of time spent in operating each.
  - Responsibility for preparing reports. Give particular attention to the nature and purpose of the reports, both regular and special, the variety of reports, the varied sources of information consulted, and the extent of analysis required of the books of account. Indicate whether this responsibility is shared by others in the office, and, if so, how.
  - Participation in the development and establishment of accounting forms, systems, and procedures. Point out elements of originality or creativeness.

2. The percentage of total working time spent on clerical-auditing work.  
Indicate, for example:
  - The type and variety of vouchers audited, e.g., Miscellaneous Purchases (1034), Travel (1012), Advertising (1054), and others. Indicate the amount of time spent on each.
  - The steps followed in examining the vouchers. Show what items are checked, what rules, regulations, and decisions are applied, and what kinds of problems are met.
  - The number of appropriations, and their limitations, involved in the audit process; also, the number and variety of contracts.
  - Responsibility for preparing correspondence in connection with GAO suspensions or disallowances and with claims of individual employees and contractors. Describe some typical problems and the way they were handled. Indicate the amount of time devoted to this work.
  - Authority to act as a Certifying Officer for the organization, with respect to payrolls and all types of vouchers.
  - Responsibility for interpreting contract terms and conditions in determining the legality and validity of vouchers.
3. The nature, purpose, and frequency of contacts with others.  
Indicate with whom they are made, how they are made, and for what purpose they are made. Illustrate authority to give out information, or to otherwise represent or commit the office. Describe the problems arising in such relationships.
4. From whom supervision is received, and the nature of that supervision. Indicate how assignments are received, the kind of instructions given with assignments, and the nature of checks on work in progress. Point out what review is made of completed work, and what types of questions are referred to the supervisor for decision or discussion.
5. Employees supervised. Indicate the title and classification grade of each position, and the name of the incumbent. Describe the manner in which supervision is exercised, and what problems of planning, coordination, and control exist.

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SPECIAL QUESTION LIST  
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MAIL, FILE, AND RECORD CLERK POSITIONS

The following list of suggested items is offered as an aid to position classifiers in auditing and evaluating Mail, File, and Record Clerk positions. Few positions will require answers to all of the questions. All are included in this list to make sure that every important part of a Mail, File and Record Clerk position is credited in determining the classification and grade level of the position. If any question does not apply, it should be ignored.

Indicate:

1. Variety of work activities, for example, receiving and sorting, classifying, searching, following up and expediting, routing, dispatching, weighing and stamping, indexing, briefing, revising systems, supervising. Show the percentage of time spent on each operation.
2. Filing system used, as to type. Indicate whether it is a numerical, alphabetical, chronological, geographical, Dewey Decimal, or other subject system. Describe the organization of the files, and give some indication of the size of the files.
3. In classifying, the kind of material which is classified, i.e., maps, design plans, fingerprints, correspondence; and the variety of their subject matter content. Indicate, also, the number of file classifications that are used, and any problems or difficulties that arise in this phase of the work.
4. In searching, what is searched for, where the searching is done, i.e., within the office, throughout the Bureau, Yard, etc., or in an outside agency; and the frequency with which such assignments are received. Point up typical problems which are met in this work, and what is done about them.
5. In routing, the normal number of destinations for the mail, and the average volume of mail processed weekly. Indicate any difficulties found in this work, such as those arising from expediting activities.
6. Responsibility for the review of outgoing mail. Indicate the purpose of the review, and authority to make corrections or to send the mail back to the originating office for revision.
7. With whom, outside the office, contacts are made, and how they are made. Describe clearly the frequency with which such contacts occur, and the purpose of the contacts.

8. Authority to give out information, either in person or over the telephone. Indicate the kind of information transmitted and where and how easily it is obtained. Show, particularly, in what instances judgment or discretion is required, as in passing out confidential or secret information.
9. Participation in the planning and development of mail and file procedures. Cite specific cases of recommendations or decisions made which resulted in changes in the mail or file system, or in the way in which the work is done. Describe any work involving responsibility for the installation of a new mail or file organization.
10. What manuals, bulletins, written instructions, and similar material exist as guides for the work. Indicate in what respects such standard guides are not applicable, and what adaptations must, consequently, be made.
11. From whom supervision is received, and the nature of that supervision. Indicate how assignments are received, the kind of instructions given with assignments, and the nature of checks on work in progress. Point out what review is made of completed work, and what types of questions are referred to the supervisor for decision or discussion.
12. Employees supervised. Indicate the title and classification grade of each position, and the name of the incumbent. Describe the manner in which supervision is exercised, and what problems of planning, coordination, and control exist.

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SPECIAL QUESTION LIST  
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STATISTICAL CLERK POSITIONS

The following list of suggested items is offered as an aid to position classifiers in auditing and evaluating statistical clerk positions. Few positions will require answers to all the questions. All are included in this list to make sure that every important part of a Statistical Clerk position is credited in determining the classification and grade level of the position. If any question does not apply, it should be ignored.

Indicate:

1. Nature of the statistics, as to the purpose they serve, the subject matter involved, and the form in which the data is received.
2. Equipment used, for example, adding and calculating machines, slide rules.
3. Responsibility for selecting data. Indicate sources, including operating records, and problems, as in converting and interpreting.
4. Responsibility for tabulating data. Indicate categories, grouping problems, sources.
5. Responsibility for verifying. Indicate methods and procedure followed.
6. Responsibility for coding. Indicate the character and variety of codes, speed required, and the extent of standardization.
7. Responsibility for reviewing data and schedules. Indicate the purpose of the review, and action taken on discrepancies.
8. Responsibility for presenting data. Describe tables, charts, maps, diagrams, graphs prepared; and indicate responsibility for such matters as headings or explanatory texts.
9. Responsibility for collecting data. Indicate methods used, guidance received and problems involved.
10. Responsibility for answering inquiries. Indicate sources of information, and nature of interpretations given without reference or review.
11. Responsibility for devising forms, formulas, and presentations: and for determining statistical clerical methods to be used.
12. Special elements, of difficulty or responsibility, due to unusual equipment, technique or methods used, or special subject-matter knowledge required.

13. Nature and purpose of personal contacts. Indicate with whom such contacts occur and what is accomplished through the contacts.
14. Nature of statistical computations, as means, mode, median, frequency distribution, standard deviation, quartile deviation, coefficient of variation, scatter diagrams, linear correlation.
15. Responsibility for interpreting statistical data.
16. From whom supervision is received, and the nature of that supervision. Indicate how assignments are received, the kind of instructions given with assignments, and the nature of checks on work in progress. Point out what review is made of completed work, and what types of questions are referred to supervisor for decision or discussion.
17. Employees supervised. Indicate the title and classification grade of each position, and the name of the incumbent. Describe the manner in which supervision is exercised, and what problems of planning, coordination, and control exist.

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SPECIAL QUESTION LIST  
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TABULATING EQUIPMENT OPERATOR POSITIONS

The following list of suggested items is offered as an aid to position classifiers in auditing and evaluating tabulating equipment operator positions. Few positions will require answers to all of the questions. All are included in this list to make sure that every important part of a Tabulating Equipment Operator position is credited in determining the classification and grade level of the position. If any question does not apply, it should be ignored.

Indicate:

1. Subject matter, and kind and variety of data tabulated, such as vouchers, encumbrances, payrolls, construction employment data, personnel data.
2. Kind of equipment used, as alphabetic key punch, numeric key punch, electrical printing and listing tabulators, sorters, verifiers, reproducers, gang punches.
3. Form in which data is received, with particular reference to the amount of uncoded data.
4. Kind and variety of work operations, for example, operating machines in punching, verifying, sorting, interpreting, collating, tabulating, changing controls, wiring plugboards, checking tabulations, filing or maintaining punch card files, making minor repairs.
5. Extent of responsibility for wiring or re-wiring plug-boards, (indicate frequency of re-wiring, and describe operations for which wiring is done).
6. Responsibility for devising new codes, determining machine methods to be used for special tabulations, designing forms and punch cards, devising procedures, preparing diagrammatic instructions, arranging data.
7. Responsibility for keeping control records.
8. Special difficulty elements, such as consequence of error, absence of diagrammatic instructions for wiring or re-wiring, need for knowledge of special subject matter, as of the accounting or statistical procedures. Describe.
9. Contacts with others. Indicate with whom they are made, for what purpose, and the amount of total working time spent. Describe any special advisory work, or field trips.

10. From whom supervision is received, and the nature of that supervision. Indicate how assignments are received, the kind of instructions given with assignments, and the nature of checks on work in progress. Point out what review is made of completed work, and what types of questions are referred to the supervisor for decision or discussion.
11. Employees supervised. Indicate the titles and classification grade of each position, and the name of the incumbent.

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SPECIAL QUESTION LIST  
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TYPIST AND CLERK TYPIST POSITIONS

The following list of suggested items is offered as an aid to position classifiers in auditing and evaluating typist and clerk typist positions. Few positions will require answers to all the questions. All are included in this list to make sure that every important part of a Typist and Clerk Typist position is credited in determining the classification and grade level of the position. If any question does not apply, it should be ignored.

Indicate:

1. The nature of the material typed from. Point out, for example, whether the typing is done from plain copy or clean rough draft, from charts and tabulations, or from involved or complicated rough draft. Give the approximate percentage of total working time devoted to each kind of typing.
2. What is typed; for example, cards forms, letters, memoranda, reports, charts, tabulations, or bulletins.
3. Problems or difficulties arising in typing. Indicate problems of counting, spacing, and arrangement of material. Describe the knowledge and skill required to decipher or interpret marginal notes on copy, interlineations, and abbreviations and insertions.
4. The percentage of time spent in operating various types of machines, such as in dictating-machine transcription, vari-typing, electric and long-carriage typewriting, or in the use of other related equipment.
5. The frequency with which special rush assignments are received. Point out the nature of such typing work, and the particular difficulties that are met.
6. Performance of clerical duties not involving typing. Describe the exact nature of such duties, and the amount of time devoted to performing them. Indicate, for example, what is done in the way of filing material, keeping records, reviewing and processing mail and official documents, giving out information in person or over the telephone, compiling data, and preparing reports.
7. Responsibility for determining methods, techniques, or procedures, i.e., the way in which something is to be done.
8. The nature and purpose of personal contact work. Indicate with whom such contacts occur and what is accomplished through the contacts. Be sure to indicate authority to act, or to represent the office on matters, or to make commitments involving the work.

9. From whom supervision is received, and the nature of that supervision. Indicate how assignments are received, the kind of instructions given with assignments, and the nature of checks on work in progress. Point out what review is made of completed work, and what types of questions are referred to the supervisor for decision or discussion.
10. Employees supervised. Indicate the title and classification grade of each position, and the name of the incumbent. Describe the manner in which supervision is exercised, and what problems of planning, coordination, and control exist.

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SPECIAL QUESTION LIST  
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STENOGRAPHER AND CLERK STENOGRAPHER POSITIONS

The following list of suggested items is offered as an aid to position classifiers in auditing and evaluating stenographer and clerk stenographer positions. Few positions will require answers to all of the questions. All are included in this list to make sure that every important part of a Stenographer or Clerk-Stenographer position is credited in determining the classification and grade level of the position. If any question does not apply, it should be ignored.

Indicate:

1. Percentage of total working time spent in taking and transcribing dictation.
2. The frequency with which unusually difficult or novel terms and expressions appear in the dictation. Cite examples of such terms and expressions. Indicate whether or not special training was received in the language or jargon used in the work of the office, and how long the course ran.
3. The variety, or different number, of subject matter fields covered regularly in the dictation, e.g., procurement, civil engineering, personnel, accounting. Indicate the knowledge required of the subject matter in each case.
4. Whether or not the dictation itself requires, for effective recording, a knowledge on the part of the stenographer of the organization as a whole, the work and personnel of the various offices, and the established procedures and practices. Give examples of the nature of such knowledge requirements.
5. Skill required, in terms of speed and special accuracy requirements. Indicate the extent to which absolute accuracy is needed and the consequence of errors.
6. Amount and kind of group dictation including hearings, conferences, telephone conversations. Indicate whether dictation is taken verbatim or whether the gist of the discussion is taken. Show how many participate in the discussions, whether interruptions by the stenographer are permissible to request repetition or clarification, and the length of the sessions. Indicate how much of total working time is taken up by this work.
7. Whether dictation is taken in a foreign language.

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8. The amount of time devoted to non-stenographic, clerical duties and the exact nature of such duties. For example:
- Maintaining files and records. Describe the content of these, their size or scope, and the purposes they serve.
  - Receiving visitors and telephone calls to the office. Indicate the frequency with which these come in, and how they are disposed of.
  - Composing correspondence. Show the amount and nature of such correspondence.
  - Searching for and compiling data and material for the use of the supervisor. Indicate the general character of the information gathered, the sources of information consulted, and the uses made of the data.
  - Reviewing outgoing correspondence. Point out the extent and purpose of such review.
  - Maintaining office supplies and equipment, preparing requisitions and orders, expediting the progress of materials and documents, distributing supplies.
  - Participating in administrative operations, as in processing personnel actions, establishing and maintaining budgetary controls, organizing and assigning work, or planning and negotiating space and equipment arrangements.
9. The nature and amount of personal contact work, showing the extent of authority to commit or represent the office, or to determine what information is to be given out over the telephone or in person. Give examples. Point up problems and difficulties arising in such relationships.
10. From whom supervision is received, and the nature of that supervision. Indicate how assignments are received, the kind of instructions given with assignments, and the nature of checks on work in progress. Point out what review is made of completed work, and what types of questions are referred to the supervisor for decision or discussion.
11. Employees supervised. Indicate the title and classification grade of each position, and the name of the incumbent. Describe the manner in which supervision is exercised, and what problems of planning, coordination, and control exist.

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October 25, 1944

Personnel Division  
Classification Section  
Allocation Factors

One of our field classification investigators recently indicated that it would be helpful if we could develop some good material regarding allocation factors. The following is a consolidation and revision of some material on this subject which has been developed by the Navy Department. To our knowledge it constitutes the best material of this nature which is available at present.

There are listed 8 basic allocation factors which generally are common to any position. To facilitate the evaluation of these allocation factors is a list of questions designed to develop information of value in determining the presence and degree of each allocation factor in a specific position. No attention has been given to questions designed to develop information on the services or class of positions under consideration since determination of these features is the least difficult part of the allocation process. This list is not all-inclusive and should be added to or disregarded as any specific situation warrants. We would appreciate suggestions or comments as to additional questions which your experience indicates are valuable.

<u>Allocation Factors</u>	<u>Pertinent Questions</u>
I. Supervisory control exercised over the position.	1. What is the grade and organizational location of the Supervisor?  2. How are assignments made to the incumbent? (i.e. - oral or written?)  3. How is his work reviewed or checked? (thorough or spot check; daily or intermittent; evaluation only of final results of actions taken;)  4. What is the purpose of the check or review?
II. Availability and Nature of Guide Lines.	5. What final actions does employee take which are not subject to review or approval?  6. How do such actions affect program operations?
	1. What decisions and judgments does the employee make and on what are they based?

2. Are such decisions and judgments based on clearly established precedents, rules, regulations or oral instructions?
3. Are problems encountered in ascertaining what precedents apply or in determining whether such precedents, rules, etc. exist? If so, what are these problems?
4. What special training is required to determine applicable precedents and whether they are applicable.
5. What kind of assistance or advice is given the incumbent by others in determining what to do?

III. Originality of thinking required.

1. What parts of the job are not governed by established procedures, rules or precedents or reference to others?
2. In such cases what criteria, source material, etc., does incumbent refer to or adapt?
3. In what ways are imagination and inventiveness required to carry on assignments?
4. What are examples of such situations?

IV. Variety

1. What essentially different kinds of work are done? (i.e. analysis, investigation, composition, etc.)
2. What distinctly different skills, training, experience or knowledges are needed in the work?
3. Are these skills or requirements reflected in recruiting qualifications for the position?
4. What different techniques are used?
5. Does the incumbent have to be a specialist in more than one field of work?

V. Purposes and nature of Personal relationships.

1. Who is contacted and what is their position?
2. What is the purpose of such contacts; (a) to obtain information; (b) to give information; (c) to obtain co-operation; (d) to persuade officials

to follow a certain course; (e) to defend a policy or action taken?

3. What problems and difficulties are involved because of opposing facts, policies, actions, arguments, etc.?
  4. What is the importance of the contact work?
1. What actions is the incumbent authorized to take such as approvals, agreements or promises which commit the organization to a definite course of action.
  2. What are the possible results of such actions?
  3. What kind of statements is the incumbent authorized to make concerning organization policy, procedure, or courses of action?
  4. What is the basis of commitments made (i.e. precedent, rules, regulations; must these be interpreted; if so, how?).

VII. Nature of control of work of others.

1. What kind of supervision does incumbent give to positions under his control?
  - (a) does he plan and organize the work
  - (b) does he personally distribute and direct the work;
  - (c) does he personally review all work performed by subordinates;
  - (d) does he delegate such immediate supervisory assignments to subordinates;
  - (e) is the supervision basically of a managerial nature or that of a working supervisor?

VIII. Number and Level of Positions Controlled.

1. How many positions of what titles and grades are under the control of the incumbent?

The above allocation factors are proposed to apply generally to almost any position which you may have under consideration. The first three are considered to be about 50 percent more important than the others, and they should be given this additional value in allocating positions.

You will notice that "Qualification Requirements" have not been included as a separate allocation factor. This element usually is an important factor only in a few professional or technical positions; in most positions it is subordinate to the other elements listed. Because of the ease with which the importance of this factor is recognized in the few positions to which it applies we do not believe a thorough discussion is necessary. Examples of positions in which qualifications might be a factor carrying considerable weight would be research consultants or any other highly specialized technical advisory position.

We are also attaching a list of special questions for specific types of jobs. These special questions provide an excellent basis for investigating those classes of positions to which they pertain.

The position evaluation pattern which is attached was developed by the Navy Department in an endeavor to measure mathematically the degree to which each allocation factor exists in a position. In using this form, the position classifier determines the correct amount of each factor and marks it on the pattern. The complete key by which the totals obtained are converted into a classification grade is not available. The position evaluation pattern, however, may be used advantageously as a check list in your analysis of positions in order to assure that the eight basic allocation factors are given full consideration.

The excellent material which follows is an excerpt from an article by Stanley T. Orear, Lieut., U.S.N.R. which appeared in the December, 1943 issue of Personnel Administration. We believe that it will be of considerable interest to you in relating the questions which we have set forth to the position evaluation pattern.

#### I. SUPERVISORY CONTROL EXERCISED OVER THE WORK

This factor serves to measure the work of the position as to the degree of deliberate, planned control exercised over it by higher authority. The control with which this factor is concerned is POSITIVE and reflects the considered decision of higher authority to limit the number of operations which the incumbent is to perform, the kinds of decisions which he may make, and the degree of finality of those decisions. Of course the method by which this control is applied varies from occupation to occupation and even within one occupation different methods are used at different levels. In many manual and some white collar occupations supervisory control is effected through actual physical demonstration to show what is to be done and through the physical measurement of the results. Supervisory control over work which is entirely mental in character may be applied through oral or written directions, through requiring periodic progress reports (oral or written), or both. In some cases the control may be effected through indirect checks of results, as, for example, by consideration of the degree of public acceptance or disapproval of the major results of a public activity under the charge of the incumbent of the position concerned.

To illustrate further the nature of this factor, two engineers may have identical tasks in estimating and designing, but if estimates and designs of one are used directly as a basis for the expenditure of materials and labor, without review and approval by higher authority, while all designs and estimates produced by the other are reviewed for technical adequacy by the superior who assigned the work, then so far as this factor is concerned there is a measurable difference between the two positions. This factor should not be confused with the "guide lines" factor. While this one is concerned with the why and how of deliberate SUPERVISORY GUIDANCE and restriction, the other has to do with those SUBJECT MATTER and OPERATIONAL

limitations and controls which govern the decisions made by the man on the job.

### III. AVAILABILITY AND NATURE OF GUIDE LINES

This factor is one of the most significant measures of, to put it loosely, whether the mental work of a position is hard or easy; whether its requirements for knowledge, skill and ability are great or small.

A large part of the work of any position, excepting only purely physical effort, involves the examining, appraising, and interpreting of available facts and the making of decisions on their meaning. That meaning, in turn, is determined largely by reference to precedents, regulations, work practices, professional standards, and personal experience. These precedents, practices and the like constitute the body of "guide lines," which play a major role in governing the work of the draftsman and the physician, the executive and the mail clerk.

### III. ORIGINALITY OF THINKING REQUIRED

Some positions which are characterized by relatively high degrees of several of the other factors have very minor originality requirements. Others which have little variety, involve making no commitments, include no supervisory responsibilities, and require little or no contact with others, may require originality in high degree.

For example, the chief clerk of an organization may deal with a variety of problems which require different kinds of knowledge and skill; he may make commitments of considerable importance; and he may have to control the work of many subordinates. At the same time, no one of his tasks may require much actual originality, every problem either being decided by rule or precedent or referred to higher authority.

By contrast a physicist position at the first or second professional level may require the use of a high degree of imagination and inventiveness in finding solutions to problems which have never been solved and which cannot be dealt with by simple referral to higher authority. Thus, when each position is evaluated in terms of ALL of the factors, although the chief clerk position may clearly require allocation to a class of higher level than does the physicist position, we are assured that adequate recognition has been given to an important element of that latter position.

A relatively high degree of this factor is often found in positions involving creative writing, as in the writing of propaganda intended to cause predetermined mental and emotional responses and to induce desired action on the part of the readers or listeners.

### IV. VARIETY

Perhaps no other single element serves so well to distinguish between different levels of work as the degree of variety, but to serve this purpose well the term must necessarily be given a fairly precise meaning. Specifically, that meaning is the extent to which the work done includes ESSENTIALLY DIFFERENT THINGS.

Variety is significant for classification purposes only as it makes the work of the position as a whole more complex, thus adding measurably to the qualifications required. That is, if in one position many different kinds of techniques (and consequently diverse skills and knowledge) must be used, while in another the same

task performed by the same method is repeated again and again, the degree of VARIETY is greater in the first than in the second position.

To illustrate further, a given file clerk position may involve the maintenance of ten different sets of files, some alphabetic, some numeric and some geographic. The filing and related operations may include sorting, labeling, inserting, cross indexing, pulling, charging and reporting on transactions. To the file clerk, it may seem that she does a "variety" of different things, yet the personnel man who is evaluating the position cannot recognize a very high degree of the ALLOCATION FACTOR of variety in the work. His analysis tells him that the placing of material in alphabetic order in the "contract" file is not ESSENTIALLY DIFFERENT from going through what is practically the same mental process in placing it in the "creditor" file. Further he finds no inherently different skills or knowledges necessary to extract and post specified figures, to arrange file materials in numerical order, to hand-write labels and paste them on folders, and to compile monthly reports of the number of pieces filed in each category.

By way of contrast, the next position which the classifier evaluates may be that of a Federal budget analyst. The work of this position may involve, among other duties the making of estimates of future requirements for personnel, supplies, equipment, space, communications, printing and travel. This estimating process may in turn require that the budget analyst master the essentials of the various programs of the organization, that he appraise the effectiveness of the methods used to carry on those programs, that he understand and follow the budget making procedures prescribed by the Budget Bureau and the Congress, that he use semi-professional accounting techniques, and that he make effective written and oral presentations of the organization's needs with relation to what it does and how it does it. Here the classifier finds that several of the operations performed ARE essentially different, requiring the use of UNRELATED TECHNIQUES and calling for a diverse body of knowledges and skills. There is no particular subject matter or method relationship between the analysis of work load, the application of accounting principles to the maintenance of fiscal control accounts, and the effective oral presentation of the agency's case to a group of skeptical Budget Bureau Examiners or members of Congress. In his evaluation of this position the classifier will obviously determine that the variety factor is present in relatively high degree.

#### V. PURPOSE AND NATURE OF PERSON-TO-PERSON WORK RELATIONSHIPS

The significance of the personal relationships involved in the work of many positions as a determinant of level has, like the weather, been much discussed--and about as little has been done about it. That it constitutes a significant distinguishing characteristic is obvious; it appears--in fact--more often than many other factors as the ONLY distinguishing element between two positions which are otherwise identical.

Consider, for example, the frequency with which we find two stenographic positions which involve work of the same degree of variety, under the same kind and amount of supervisory control, and subject to the same guide lines, but involving in one case a substantial amount of personal contact with top officials on matters which must be handled with extreme finesse and in the other no person-to-person relationships beyond the routine exchange of work materials with fellow employees.

Unless the real significance of the factor is understood by the classifier its use is likely to detract from--rather than add to--the accuracy of the evaluations made.

First, the mere VOLUME of personal contact is not of major significance. Some information clerk positions involve little else, but if the information conveyed is purely factual and each question asked calls for only one obvious answer, only a relatively low degree of the factor can be considered to be present. By contrast, a management engineer may devote nine tenths of his time to studies of work load, staffing requirements and organization problems and spend the remaining tenth on person-to-person relationships with top executives and legislators--explaining, defending and selling the agency's whole program. In this case the QUANTITATIVELY small amount of personal relationship is QUALITATIVELY of such a character as to indicate a relatively high degree of the factor.

Further, the RANK of the persons dealt with does not necessarily fix the degree, since even though some employees deal frequently and in person with the top officials of important public and private organizations, they deal with them only to the extent of receiving or giving cut and dried information and do not explain or secure acceptance of, or question or defend the policy or procedure to which the information relates.

#### VI. NATURE AND SCOPE OF COMMITMENTS

Although the nature and the degree of "authority" vested in a position are always of concern to the position evaluator, authority, as such, cannot be defined in such a way as to make its evaluation practicable. However, in this evaluation pattern authority is sub-divided, and certain clearly identifiable kinds are made measurable in terms of, for example, authority to control the work of others, authority to make decisions in accordance with applicable guide lines, and authority to secure the cooperation of other persons or organizations through personal contacts.

Still another important aspect of the authority content of a position is represented by the right (or obligation) of its incumbent to commit the organization to follow a course of action on which those to whom the commitment is made will base their own policies and practices. This may be through a commitment to expend or provide funds, to allow expenditures by others, to approve (or disapprove) certain kinds of actions by others, to perform a certain service, or to assume responsibility for leadership in a program involving several organizations. Whatever the subject matter of the commitment, it derives its classification significance from the extent to which it is LIMITED and the consequences which it has for the organization committed and for those to whom the commitment is made.

#### VII. and VIII. NATURE OF CONTROL OF WORK OF SUBORDINATES AND NUMBER AND LEVEL OF SUBORDINATE POSITIONS

This factor actually measures several elements which might be separately identified but which would be difficult to define and appraise consistently if we attempted to isolate them completely. That is, although such elements as planning, coordinating, following-through, leading and disciplining are all more or less involved in controlling the work of others, it is not at present practicable to deal with each one separately for purposes of evaluation.

In its broadest sense, this factor really comprises two distinct and measurable characteristics. One of these is related to the NATURE of control of subordinate positions, the other has to do with the MAGNITUDE or MASS of the control function.

The first of these, nature of control, can--as a practical matter--be so defined as to distinguish it clearly from the other and to permit the degree of its existence in a given position to be measured with satisfactory accuracy.

In certain respects this first sub-factor is related to the factor "supervisory control OVER the position." Every position is subject to SOME kind of control by higher authority and every position involves either the exercise of SOME degree of control of subordinate positions or NO degree of such control. (In the latter cases the "zero" credit given is in itself significant as a measure of relative value). This control may be relatively mechanical, i.e. to insure that every task performed is fully and accurately completed in every detail or it may be extremely general having only the purpose of insuring that manpower and other resources are used to maximum advantage to accomplish over-all objectives in accordance with major policies. In one case the supervisor may be required only to hand out work and see that it is completed and passed along to the next operation. In the other he may be required (a) to plan all operations with a view to the kinds and amounts of personal service which will be needed, (b) to secure the right kinds and amounts of labor, (c) to allocate manpower to the various projects, (d) to increase, decrease or reassign staff as needs change, and (e) to deal with all problems of employee selection, discipline, welfare and morale.

The other supervisory-control-exercised characteristic, which concerns magnitude of control, requires further subdivision to permit its practical application. Specifically, magnitude of control of subordinate positions must be measured not only with respect to the NUMBER of positions controlled, but their LEVEL as well. For example, each of two positions may involve the control of 25 subordinate positions, but if in one case the subordinate positions are all of the entrance clerical level and in the other are of advanced professional character, a difference must be recognized. This can be done easily enough by considering the NUMBER of subordinate positions and the LEVEL of such positions as separate components. It should be noted that while the same things which are reflected in LEVEL of subordinate positions are unavoidably measured to some degree by others of the factors in this pattern, the significance of the sheer mass of manpower for the use of which the supervisor must plan and be accountable is not measured to any material extent by the other factors.

This material is being presented in an effort to assist the employees of the Classification Section in performing an accurate and complete classification job. This objective will be best served by your cooperation and assistance; therefore, we request that you advise us of any questions, suggestions, or additions which you have to make about this or any related material.

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SPECIAL QUESTION LIST  
for  
MESSENGER POSITIONS

The following list of suggested items is offered as an aid to position classifiers in auditing and evaluating messenger positions. Few positions will require answers to all of the questions. All are included in this list to make sure that every important part of a messenger position is credited in determining the classification and grade level of the position. If any question does not apply, it should be ignored.

Indicate:

1. How regular the mail delivery and collection duties are. Indicate whether there is responsibility for following a regular routine schedule.
2. Route followed daily. Describe any trips between buildings in widely separated sections of the city, and how frequently they occur.
3. Service in any special capacity, such as messenger to a bureau head.
4. Amount of time devoted to the delivery and collection of confidential, secret, or urgent documents, papers and other material.
5. Amount of time devoted to the performance of clerical duties, as the sorting of mail, simple filing, etc. Describe such work.
6. Participation in the operation of office machines. Point out the type of machine used, and the time involved.
7. Independence in planning collection and delivery routes.
8. Number and classification grades of employees supervised.

